

## IPA Required Documentation Checklist

<i>CSAC provides forms for 1 – 8.</i>	New Public Schools	New Private Schools	New Out-of-State	<b>*10%</b>
<i>Institution provides documentation on items 9 – 13.</i>				
<b>1. Cal Grant Institutional Participation Agreement</b>	X	X	X	X
<b>2. Cal Grant Program Review Survey</b>	X	X	X	X
<b>3. Financial Aid Management Systems Survey</b>	X	X	X	X
<b>4. College Cost Estimate Form</b>	X	X	X	X
<b>5. Contact Information Form</b>	X	X	X	X
<b>6. Information Security and Confidentiality Agreement</b>	X	X	X	X
<b>7. System Administrator's Access Request Form</b>	X	X	X	X
<b>8. EFT Application</b>	X	X	X	X
<b>9. Proof of Receipt of Funding Title IV</b> a. Legible copy of <b>Final Funding Authorizations or COD Report or Statement of Account</b> <b>AND</b> b. Accounting/student ledger showing <b>disbursement of PELL and two of the following :</b> <b>FSEOG / Perkins / FWS</b>		X	X	X
<b>10. Current Institutional Catalogue</b>	X	X	X	X
<b>11. Audited Financial Statement</b>	X	X	X	X
<b>12. Financial Aid Disbursement Policy</b>	X	X	X	X
<b>13. Refund Policy</b>	X	X	X	X

- Institutions qualifying under the 10% Rule must also submit the **"Financial Statement and Demonstration of Administrative Capability"**